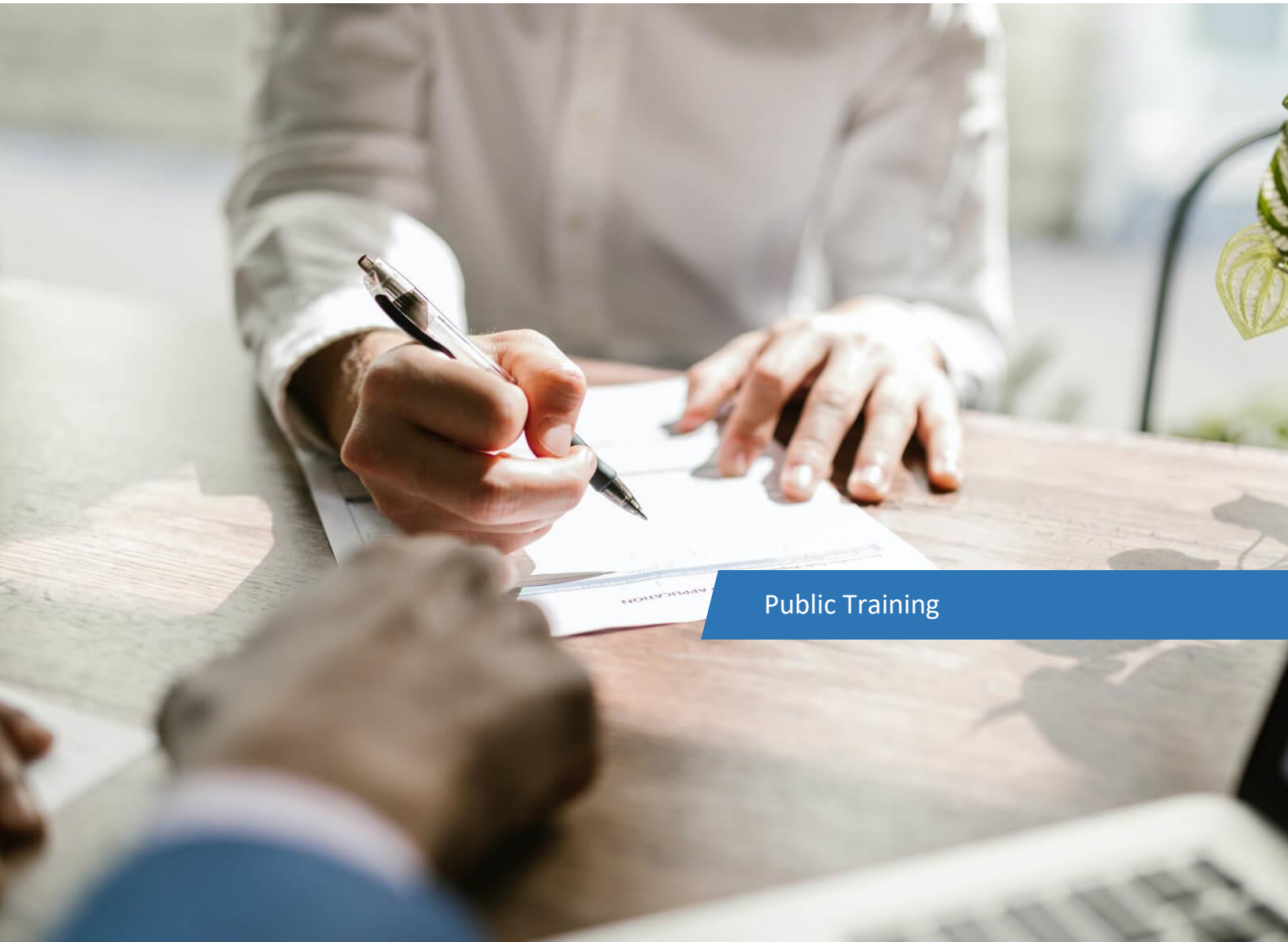




Insurance
INSTITUTE OF EAST AFRICA
— Insurance Education Anywhere Anytime —

DELIVER PROFESSIONAL INSURANCE BROKING SERVICES



Public Training

Overview

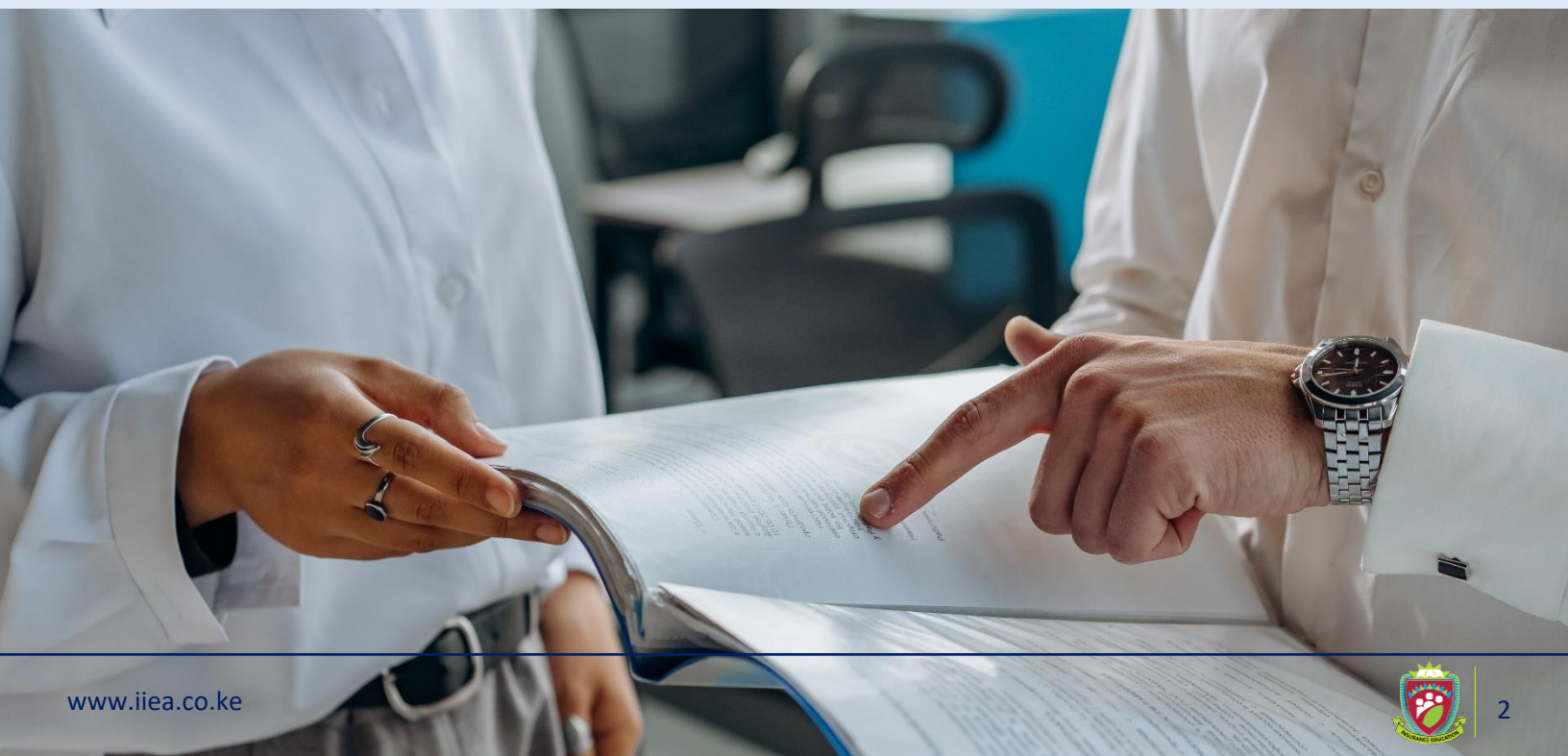
This course describes the skills and knowledge required to deliver insurance broking services to clients. It includes responding to client enquiries for broking services, undertaking risk assessments, and establishing arrangements for providing ongoing services.

The course applies to those who use well-developed communication and administrative skills when providing broking assistance in a range of client services. Individuals may work in small or large brokerage organisations dealing with retail and/or commercial clients.

Learning Outcomes

On completion of this training, you will be able to effectively:

- Respond to client enquiries for broking services
- Establish relationship with client and identify client's objectives, needs and financial situation
- Analyse client's objectives, needs, financial situation and risk profile to develop appropriate strategies and solutions
- Undertake risk assessments and conduct market research to determine the most suitable product to meet risk exposure
- Present appropriate strategies and solutions to client and negotiate financial and insurance plan, policy or transaction
- Provide an insurance program for broking client
- Agree to an insurance plan, policy or transaction and complete documentation
- Place client insurances and confirm cover with client
- Provide ongoing service where requested by client
- Provide a claims service to broking client



Day One

Establishing Relationships with Clients

At the end of this module participants will have learned about: -

- The role of the insurance broker
- Legal and ethical responsibilities for insurance brokers
- Getting to know your client and their insurance needs
- Responding to client enquiries for broking services

What is Covered

- Role of the insurance broker
- Legal and ethical responsibilities for brokers
- Three key documents
- Case Study
- Know your client
- Informal information collection
- Formal information collection

General Insurance Products and Client Solutions

At the end of this module participants will have learned about: -

- General insurance products and policies
- Risk assessments
- Broking strategies and developing client solutions
- The process of obtaining quotes from insurers.

What is Covered

- Understand general insurance products and policies
- Risk assessment
- Developing client solutions
- Get quotes from insurers
- Comparing quotes and negotiating with insurers
- Case study

Day Two

Providing Advice and Recommendations to Clients

At the end of this module participants will have looked at how to: -

- Determine client type and size
- Prepare documentation for advice
- Present recommendations to the client
- Discuss options with your client
- Place nominated insurances and confirm cover

What is Covered

- Types and size of client
- Prepare documentation for advice
- Present recommendations to client
- Case study
- Discuss options
- Place client insurance and confirm cover
- Premium invoicing and money handling

Handling and Settling Claims

At the end of this module participants will have learned about: -

- What happens after the broker successfully advises their client and places their insurance program — that is, ongoing service
- Assisting a client through a claim — one of the most common services offered by a broker
- Other services a broker might offer.

What is Covered

- Ongoing services
- Claims handlings
- Advise the client
- Notify insurers about claims
- Reviewing terms and conditions of the policy
- Repair or replacement
- Notify client terms of settlement
- Reinstating the sum insured or limit of liability
- Case study

Course Summary

Location:	Hyatt Regency Nairobi Westlands
Duration:	2 Days
Cost:	Kshs 52,500 + VAT Per Participant (Non-Residential)
Dates:	14 th – 15 th March, 2024

About Insurance Institute of East Africa

The Insurance Institute of East Africa (IIEA) is a leading provider of insurance education across the various functional areas of the insurance industry and is an approved training provider by National Industrial Training Authority (NITA) under Ref: NITA/TRN/1365.

IIEA has partnered with leading global providers of insurance education to offer a wide range of professional insurance qualifications developed by industry experts. The partners include the Insurance Institute of America (The Institutes), Cambridge International College (CIC) Britain, Australian and New Zealand Institute of Insurance and Finance (ANZIIF), International Fraud Training Group (IFTG), America's Health Insurance Plans (AHIP), Australian and New Zealand Institute of Insurance and Finance (ANZIIF) and the Institute of Chartered Shipbrokers to offer world class professional qualifications, designations, certifications and insurance fraud management programs to the insurance industry in East Africa. These programs are highly regarded across the industry and provide learners with the skills and knowledge to succeed in their careers across functional areas of the insurance industry.



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